



Preliminary Land Capacity Analysis Raleigh, NC

City of Raleigh
Department of City Planning

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What was done?

- GIS analysis to identify land available for development
 - Pipeline projects
 - Vacant parcels
 - Residential parcels of 3 or more acres
 - Parcels constrained by flood plain were excluded
 - Tax-exempt parcels were excluded
- Application of yield factors to project development capacity
 - Unit density for residential
 - Floor Area Ratio (FAR) for non-residential
- Review of permitting records to project future absorption



Why was the analysis undertaken?

- To understand how much development potential exists, and where
- To compare demand (absorption) and supply
- As a starting point for developing policies that guide where growth should occur
- As a critical baseline analysis for the forthcoming update to the Comprehensive Plan

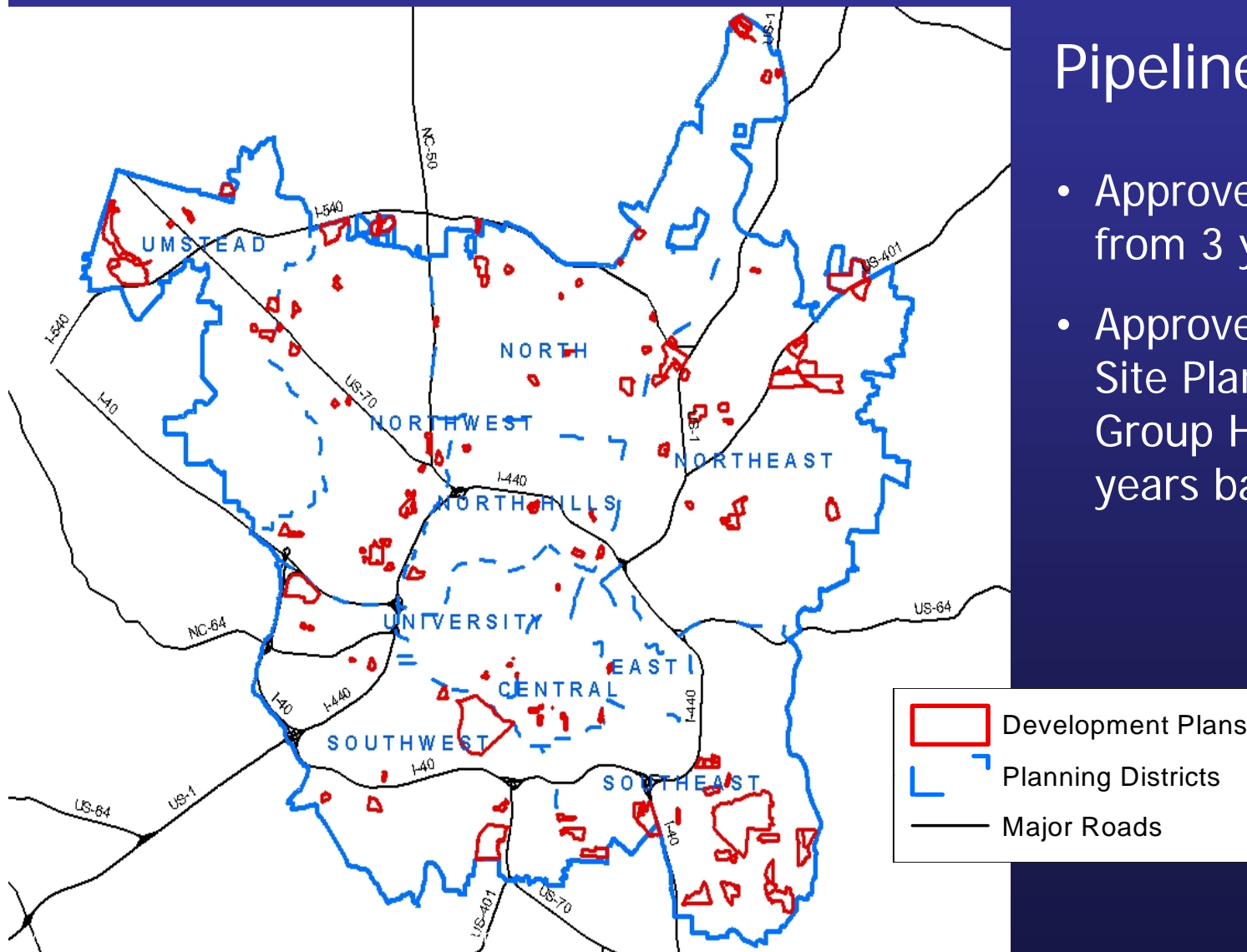


Core Assumptions

- Recent growth trends will continue
- Existing zoning framework reflects future zoning
- Developers will seek to maximize the yield of their projects
- Development will primarily occur on vacant land rather than through redevelopment

Land Capacity Analysis

Development Plans by Planning District

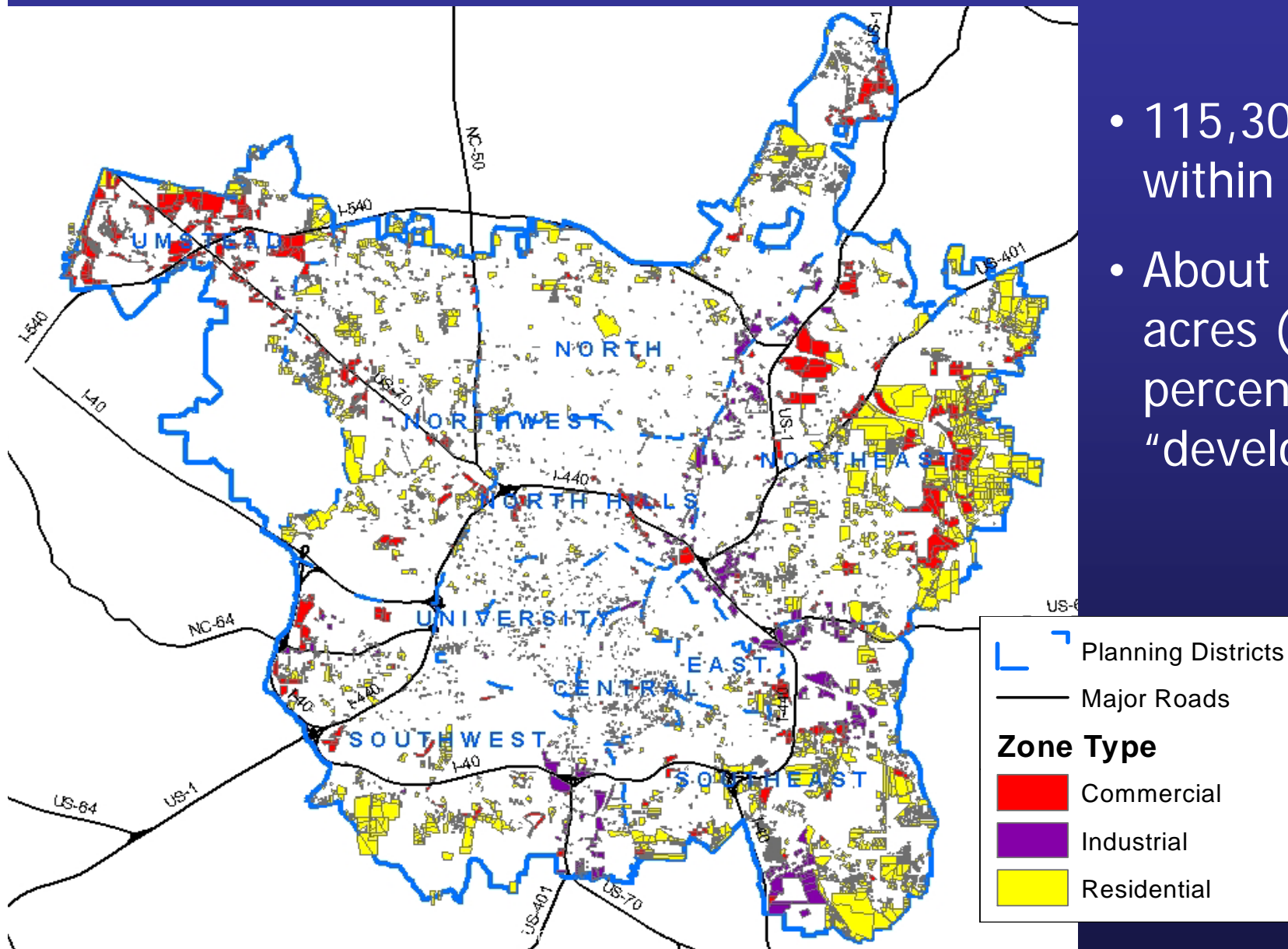


Pipeline Projects

- Approved Master Plans from 3 years back
- Approved Subdivision, Site Plans, Special Use, Group Housing from 2 years back

Land Capacity Analysis

Developable Land by Zoning Type and Planning District



- 115,300 acres within ETJ
- About 20,000 acres (17.3 percent) are "developable"

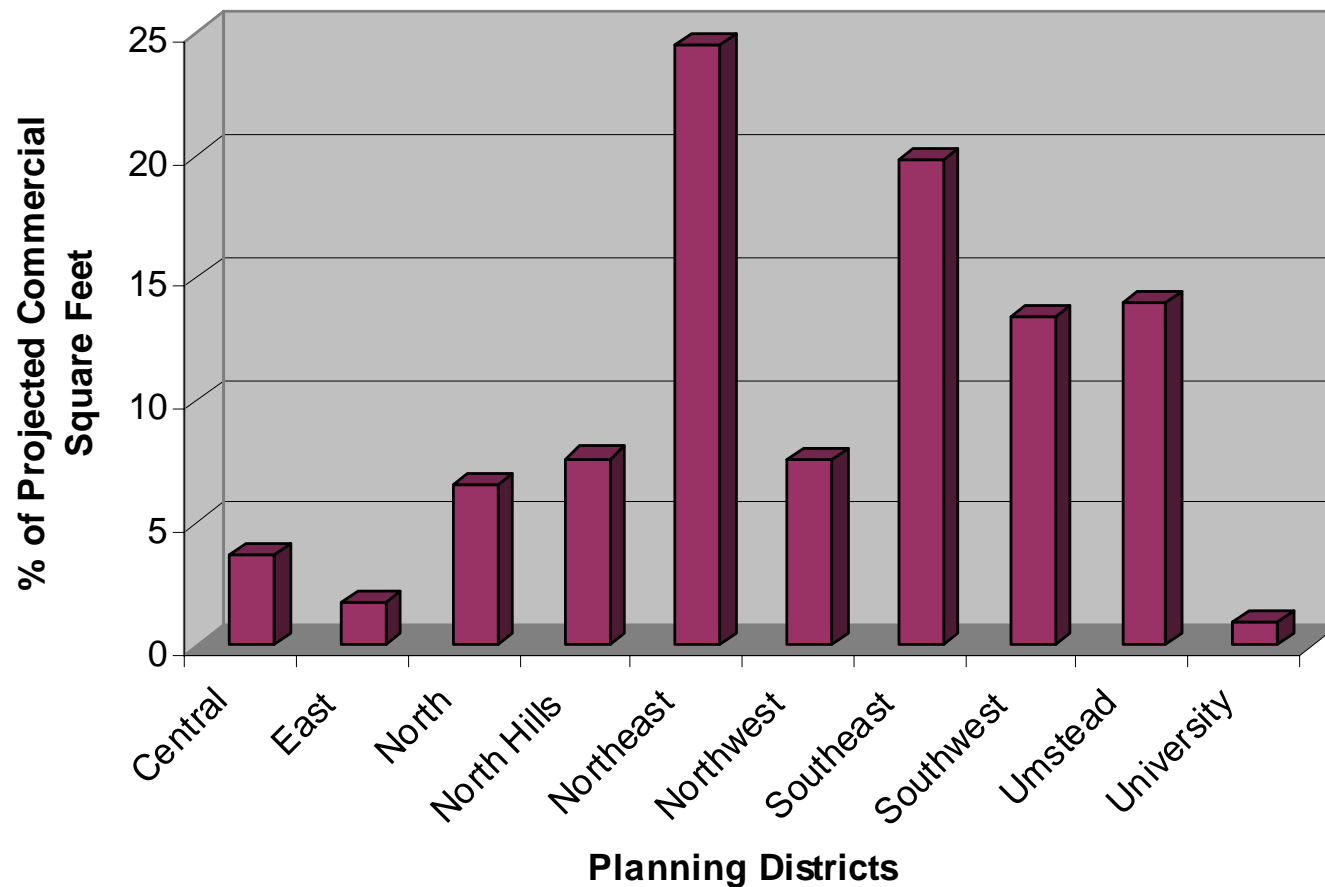


Summary: Total Development Capacity

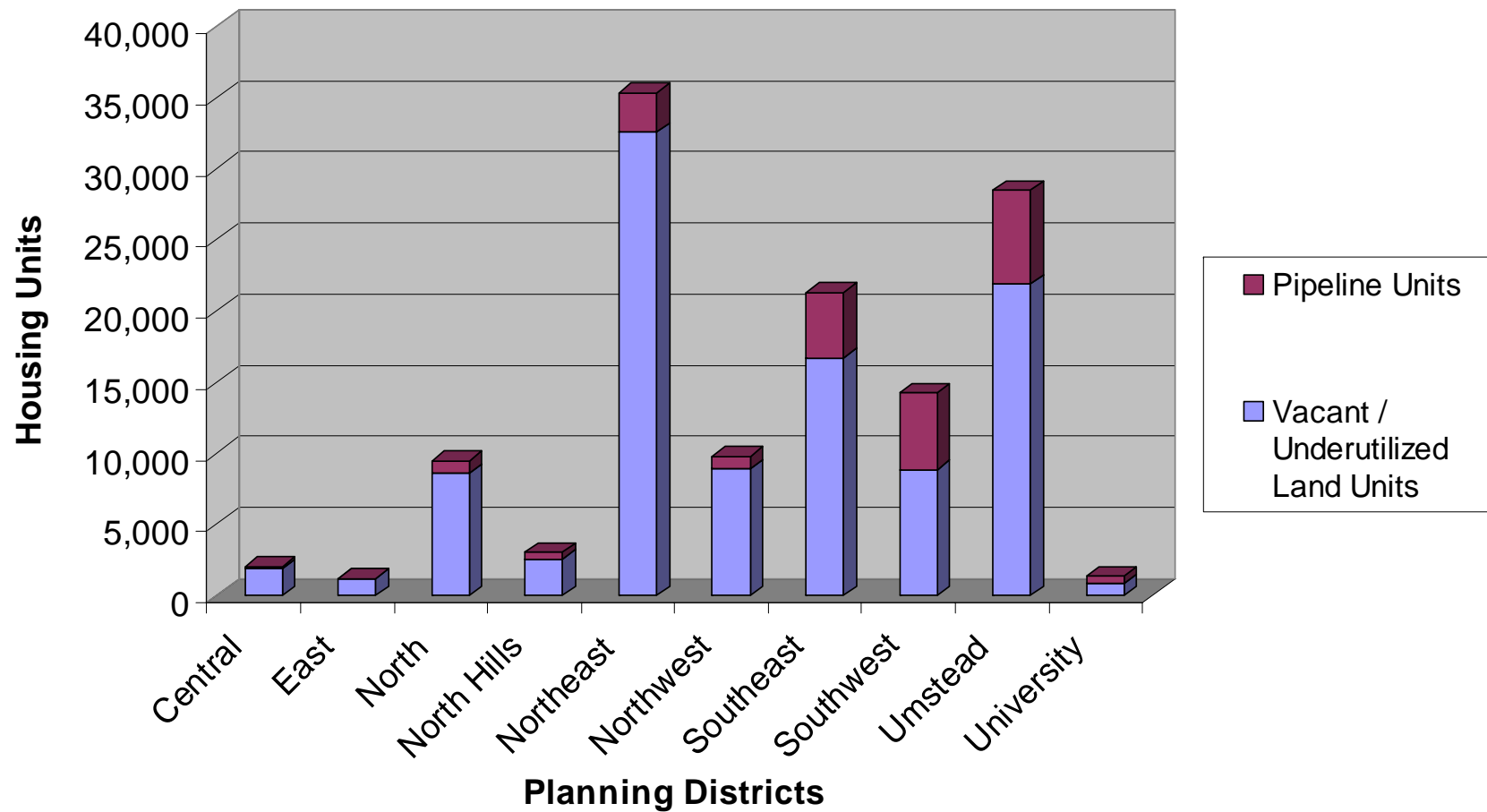
	Acres	Dwelling Units	Total Non-residential Square Feet (millions)
Developable Land	20,000	100,000	65.3
Pipeline Projects	4,300	22,000	21.4
Total	24,300	122,000	86.7

The City of Raleigh has the capacity to accommodate about **120,000 housing units** and **87 million square feet** of non-residential space within the current ETJ

Projected Non-residential Floorspace by Planning District

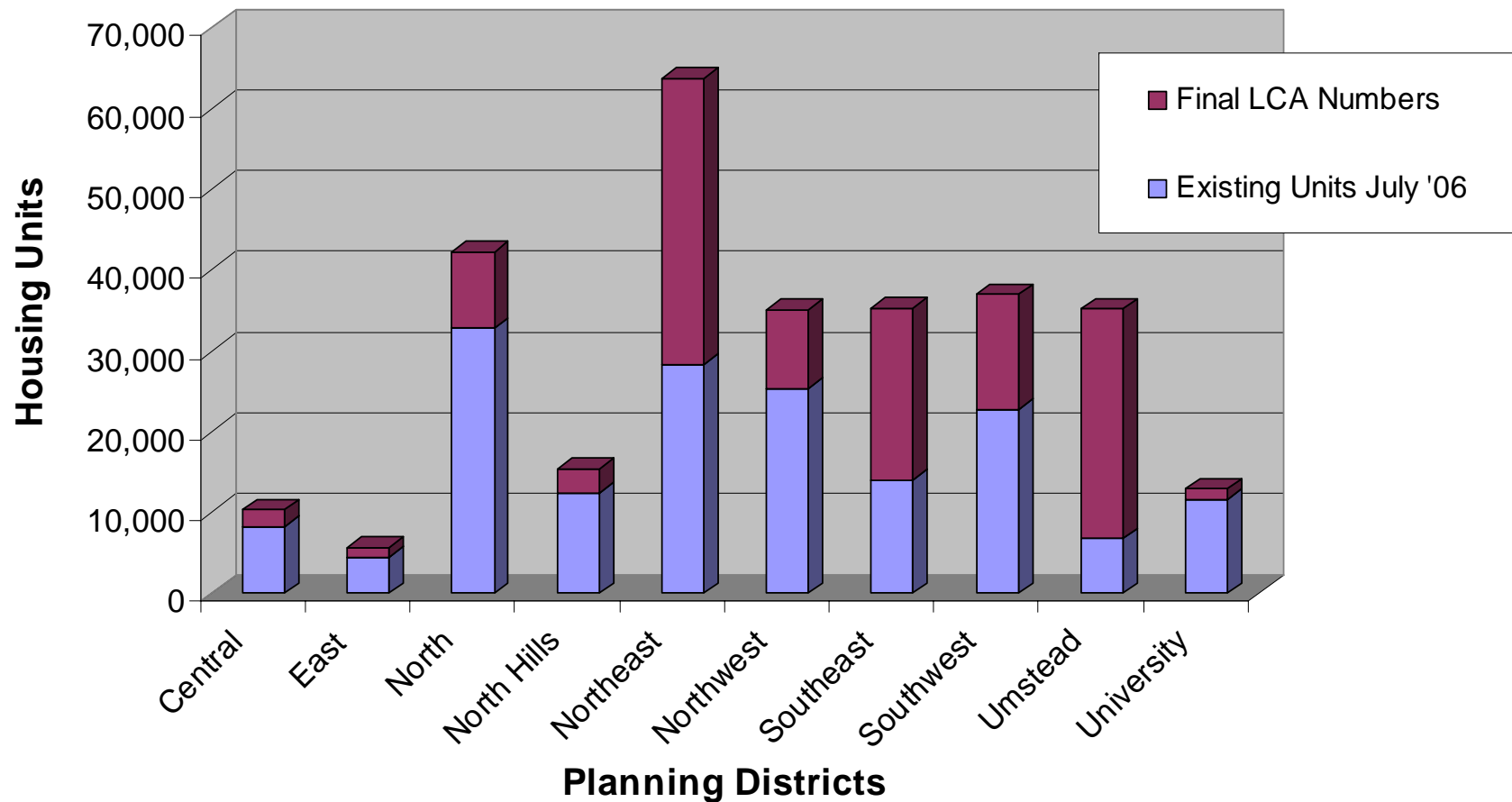


Projected Housing Units by Planning District





Existing and Projected Housing Units by Planning District



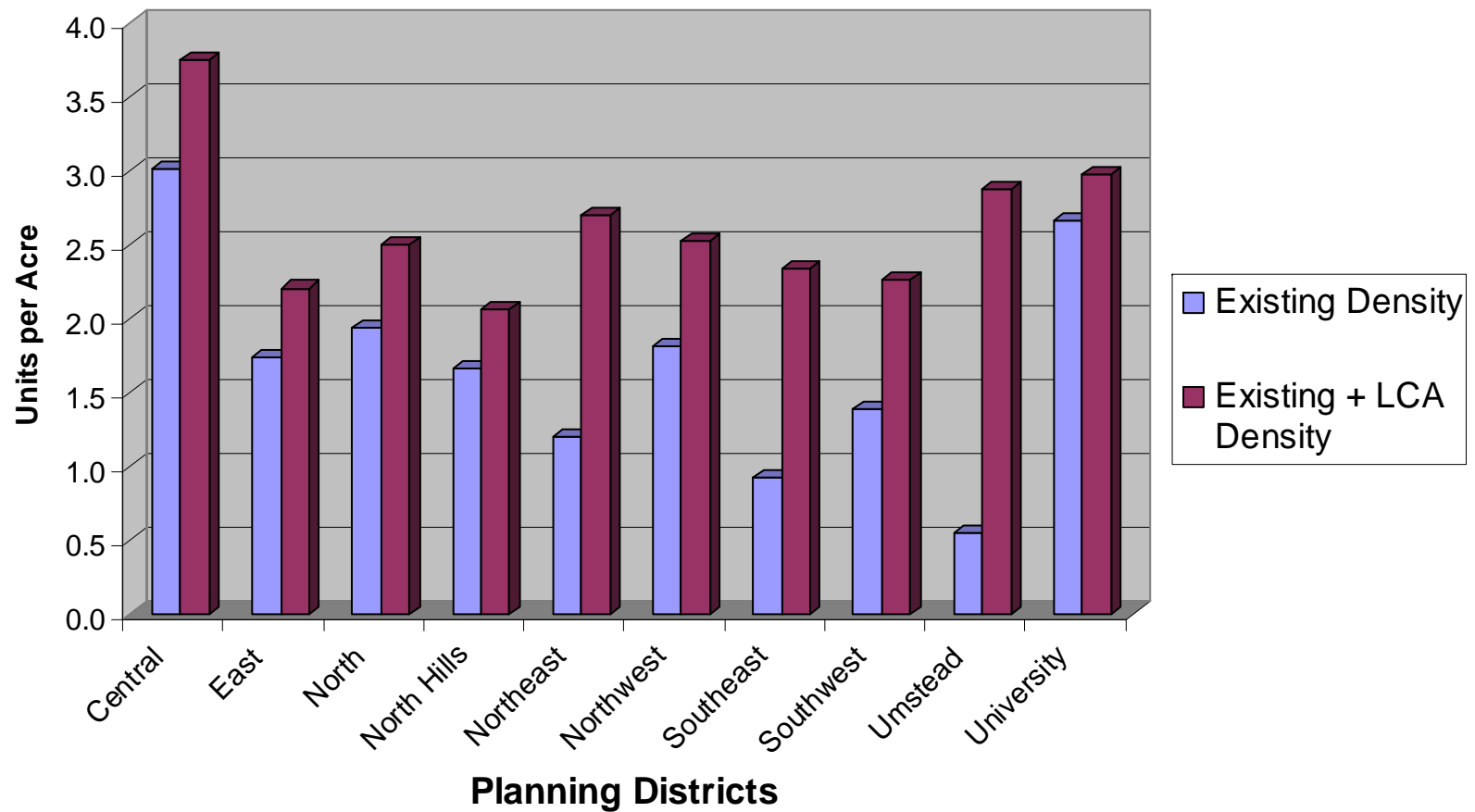
Summary: Existing and Projected Housing Units and Dwelling Unit Densities

	Acres	Housing Units	Density (units per acre)
Existing Housing Units	115,300	167,000	1.45
Developable Land Units	20,000	100,000	5 *
Pipeline Units	4,300	22,000	5 *
Totals at ETJ Build out	115,300	289,000	2.5

* Represents units per acre density on additional developable land or land in pipeline projects



Unit Densities by Planning Area



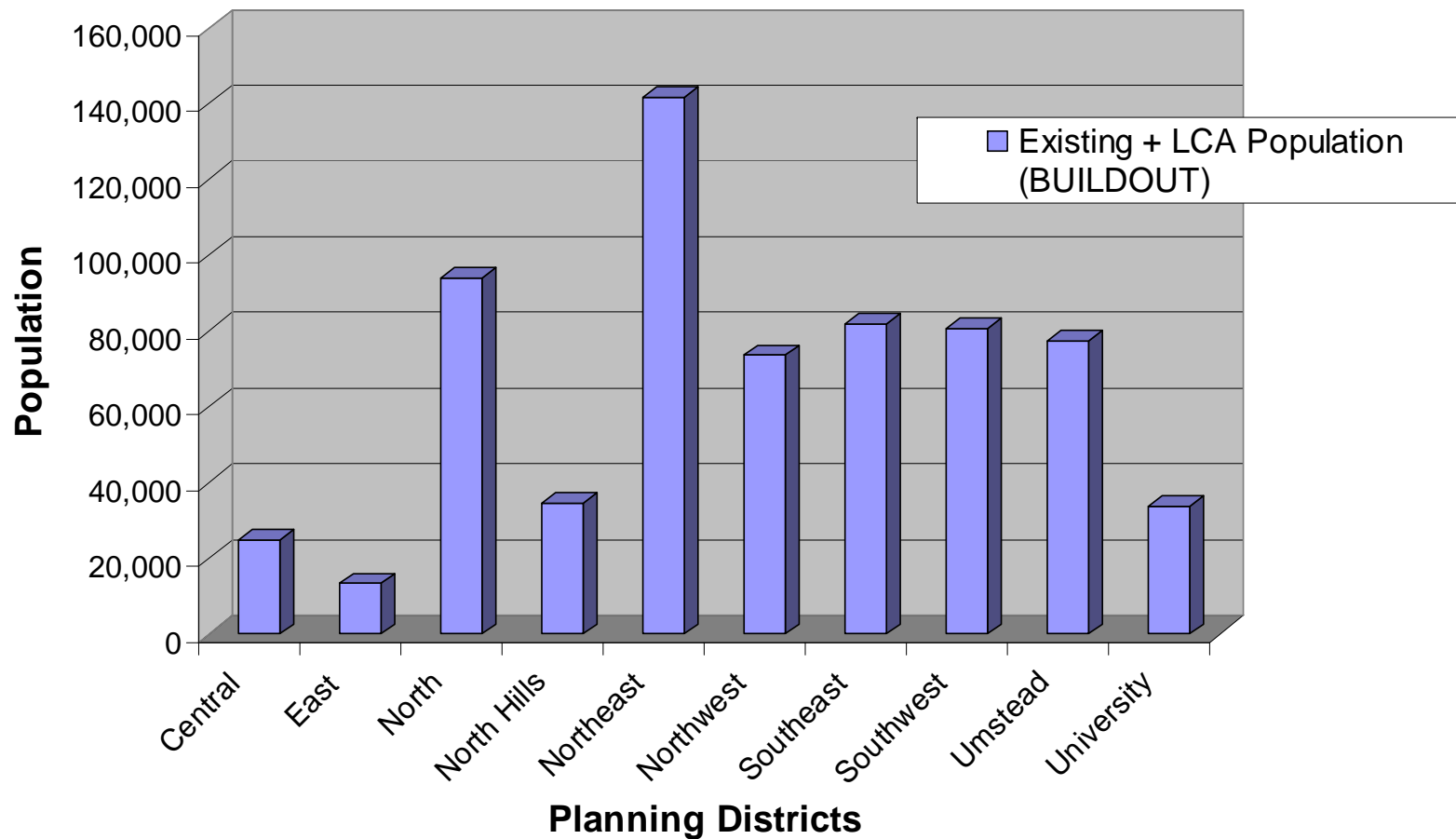


Summary: Existing and Projected Populations and Population Densities within Current ETF

	Acres	Population	Density (persons per acre)
Existing Population within ETJ	115,300	384,295	3.3
Developable and Pipeline Population	24,300	270,962	11 *
Total at ETJ Build out	115,300	655,257	5.7

* Represents persons per acre density only on additional developable land or land in pipeline projects

Population Estimates at Buildout





Demand & Absorption

	Capacity w/in ETJ (units/ millions of square feet)	Average Annual Absorption *	Years to Full Build Out
Residential	122,000 units	5,500 units/year	22 years
Non-residential	87 MSF	4.4 MSF/year	20 years

* Five year average of building permits



What about Raleigh's USA?

	SRUSA	LRUSA	Total
North/NE	3,857	5,083	8,940
Southeast	3,025	8,390	11,415
Total	6,882	13,473	20,355

Amount of land area outside of the ETJ but within the LRUSA is roughly equal to the vacant land inventory within the ETJ



Overall Conclusions

- Raleigh has the capacity to accommodate about 120,000 housing units and 87 million square feet of non-residential space within its current ETJ
- Approximately 20 to 22 years before both this capacity is fully absorbed at current growth rates
- Gross citywide residential densities will increase from 1.5 to 2.5 DU/acre
- Total population within the ETJ will increase by over 70 percent, from 384,000 to 655,000



Caveats

1. Projections are a “worst case” scenario: every development maxes out permitted density
2. But, may also understate potential: redevelopment opportunities are not included
3. Rezoning occurs frequently: each one impacts development capacity



Implications

- Raleigh could grow by 70 percent within our existing ETJ within the time horizon of the Comprehensive Plan
- Most of this growth would occur in fringe areas where the most vacant land is located
- Whether and how to shape this growth will be a major focus of the Comp Plan
- Decisions made now will have long-lasting impacts on land use, transportation, and the environment
- Significant investments in infrastructure, schools and transportation will be needed to serve this growth